

# **Crop Protection Chemicals Pesticides Market Forecasts to 2034 – Global Analysis By Product Type (Herbicides, Insecticides, Fungicides, Nematicides, Rodenticides, Molluscicides, Biopesticides, Plant Growth Regulators, and Other Crop Protection Chemicals), Origin, Formulation Type, Mode of Application, Crop Type, Pest Type, Distribution Channel, and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Crop Protection Chemicals Pesticides Market is accounted for \$94.6 billion in 2026 and is expected to reach \$138.7 billion by 2034 growing at a CAGR of 4.9% during the forecast period. Crop protection chemicals encompass a wide range of pesticides including herbicides, fungicides, insecticides, and other agrochemicals designed to protect crops from pests, diseases, and weeds, thereby ensuring food security and agricultural productivity. These products are available in various formulations and origins, serving both conventional and integrated pest management systems. The market is driven by the persistent need to maximize crop yields, protect against resistant pest populations, and meet the nutritional demands of a growing global population.

### **Market Dynamics:**

Driver:

Rising global food demand and need for higher agricultural productivity

With the world population projected to reach nearly 10 billion by 2050, agricultural systems face unprecedented pressure to increase crop yields without expanding arable land. Crop protection chemicals play an essential role in preventing pre-harvest losses caused by insects, weeds, and plant diseases, which currently destroy an estimated 20-40% of global crop production annually. By effectively managing pest pressures, these chemicals enable farmers to achieve higher yields per hectare, directly addressing food security concerns. The intensification of agriculture in developing nations, combined with the shift toward high-value cash crops, continues to drive sustained demand for effective pesticide solutions across all major growing regions.

#### Restraint:

##### Stringent regulatory frameworks and banned substance restrictions

Governments worldwide have implemented rigorous approval processes for pesticide registration, requiring extensive toxicological and environmental impact studies that can span several years and cost millions of dollars. Many legacy active ingredients face phase-outs or complete bans due to concerns about human health effects, groundwater contamination, and pollinator toxicity. Compliance with evolving regulations across different export markets creates significant compliance burdens for manufacturers. These regulatory hurdles limit the introduction of new chemistries, increase research and development costs, and reduce the available toolkit for farmers, particularly in regions where older, cheaper products are being withdrawn without affordable alternatives.

#### Opportunity:

##### Growing adoption of integrated pest management and precision agriculture

Advanced application technologies, including drone spraying, variable-rate application systems, and sensor-based pest detection, are transforming how crop protection chemicals are deployed. These precision techniques allow farmers to apply pesticides only where and when needed, significantly reducing overall chemical volumes while improving efficacy. Integrated pest management programs combine chemical controls with biological, cultural, and mechanical methods, creating demand for selective, low-toxicity products that preserve beneficial organisms. This shift opens opportunities for manufacturers developing targeted formulations, adjuvants that enhance efficacy, and products compatible with automated application systems, positioning innovation at the

intersection of productivity and environmental stewardship.

Threat:

Rapid evolution of pesticide resistance in pest populations

Continuous and often improper use of crop protection chemicals has accelerated the natural selection of resistant pest strains, rendering once-effective products obsolete. Insects, weeds, and fungal pathogens have developed resistance to multiple modes of action across all major chemical classes, including glyphosate-resistant weeds and Bt-resistant insects. Farmers facing resistant populations often resort to higher application rates or tank mixes of multiple products, increasing costs and environmental impact. The pipeline for new chemical classes with novel modes of action has slowed significantly, creating a precarious situation where resistance outpaces innovation, potentially leading to crop losses that threaten agricultural stability.

Covid-19 Impact:

The COVID-19 pandemic created both disruptions and adaptations within the crop protection chemicals market. Lockdown measures initially disrupted supply chains, delayed shipments of active ingredients from manufacturing hubs, and created labor shortages at formulation facilities and farms. However, the essential nature of agriculture ensured that pesticide production was classified as critical infrastructure in most nations, allowing operations to continue with safety protocols. Border closures and logistical bottlenecks led to localized shortages and price volatility for certain products. The pandemic also accelerated digital adoption in agriculture, with farmers increasingly using online platforms for product purchasing and technical advice, a trend that persists in the post-pandemic market landscape.

The Synthetic segment is expected to be the largest during the forecast period

The Synthetic segment is expected to account for the largest market share during the forecast period, driven by decades of established efficacy, widespread availability, and cost-effectiveness compared to bio-based alternatives. Synthetic pesticides offer reliable, fast-acting, and broad-spectrum control across diverse pest complexes, making them indispensable for conventional large-scale agriculture. Major row crops including corn, soybeans, wheat, and cotton rely heavily on synthetic herbicides, fungicides, and insecticides for economic production. The extensive distribution networks, farmer familiarity, and continuous development of new synthetic molecules with improved

safety profiles ensure that synthetic origin products maintain dominance, particularly in North America, Europe, and major grain-exporting regions throughout the forecast timeline.

The Liquid Formulations segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Liquid Formulations segment is predicted to witness the highest growth rate, reflecting farmer preferences for products that are easy to handle, measure, mix, and apply through modern spraying equipment. Emulsifiable concentrates, suspension concentrates, and soluble liquids offer superior tank-mix compatibility, reduced dust exposure during handling, and uniform application coverage compared to solid formulations. Precision agriculture technologies, including spray drones and variable-rate nozzles, are optimized for liquid inputs, accelerating adoption among technology-forward farming operations. Additionally, many emerging bio-based pesticides and novel synthetic molecules are developed as liquid formulations for rapid uptake and effectiveness, driving consistent segment expansion across both developed and developing agricultural markets.

### **Region with largest share:**

During the forecast period, the Asia Pacific region is expected to hold the largest market share, supported by extensive agricultural land, high-value crop production, and the presence of major manufacturing and consumption centers. Countries including China, India, Japan, and Indonesia have vast rice, vegetable, fruit, and cotton acreage that requires intensive pest management. The region's tropical and subtropical climates create year-round pest pressure, driving consistent pesticide application cycles. Growing domestic demand for food quality and export compliance has increased adoption of modern crop protection products. Additionally, Asia Pacific serves as a global manufacturing hub for generic active ingredients and formulations, ensuring supply chain advantages and competitive pricing that reinforce regional market leadership.

### **Region with highest CAGR:**

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by rapid agricultural modernization, expanding adoption of high-yield crop varieties, and increasing farmer awareness of advanced crop protection solutions. Nations such as India, Vietnam, Thailand, and the Philippines are experiencing

intensified pest pressures due to climate change and continuous cropping patterns, necessitating more frequent and effective pesticide applications. Government initiatives promoting agricultural self-sufficiency and crop diversification away from staple grains toward higher-value fruits and vegetables further accelerate demand. The region's large and growing population of smallholder farmers, combined with the expansion of organized retail requiring quality produce, positions Asia Pacific as the fastest-growing market for crop protection chemicals.

### **Key players in the market**

Some of the key players in Crop Protection Chemicals Pesticides Market include Bayer AG, Syngenta AG, BASF SE, Corteva, Inc., FMC Corporation, UPL Limited, Sumitomo Chemical Co., Ltd., Nufarm Limited, ADAMA Ltd., Nissan Chemical Corporation, PI Industries Limited, Rallis India Limited, American Vanguard Corporation, Albaugh, LLC, Sipcam Oxon S.p.A., Gowan Company, LLC, and Arysta LifeScience Corporation.

### **Key Developments:**

In April 2026, Syngenta expanded its digital scouting services, integrating sequential sampling plans to help farmers determine the precise economic thresholds for foliar insecticide applications against pests like the western bean cutworm.

In April 2026, Corteva introduced advanced GPS-guided planting and moisture sensors as part of its precision ag-chemical services, allowing for site-specific application of fertilizers and crop nutrition to optimize productivity in water-scarce regions.

In March 2026, Bayer announced the expansion of its regenerative agriculture programs in the US and Europe, focusing on soil health monitoring and "carbon-smart" farming practices to mitigate climate-related yield losses.

### **Product Types Covered:**

Herbicides

Insecticides

Fungicides

Nematicides

Rodenticides

Molluscicides

Biopesticides

Plant Growth Regulators

Other Crop Protection Chemicals

Origins Covered:

Synthetic

Bio-Based

Formulation Types Covered:

Liquid Formulations

Solid Formulations

Gas/Vapor Formulations

Mode of Applications Covered:

Foliar Spray

Seed Treatment

Soil Treatment

Chemigation

Post-Harvest Treatment

Trunk Injection

Drone & Precision Spraying

Crop Types Covered:

Cereals & Grains

Oilseeds & Pulses

Fruits & Vegetables

Plantation Crops

Commercial Crops

Turf & Ornamentals

Other Crop Types

Pest Types Covered:

Weed Control

Insect Control

Fungal Disease Control

Nematode Control

Rodent Control

Mollusk Control

Other Pest Types

### Distribution Channels Covered:

- Direct Sales
- Agrochemical Distributors
- Cooperatives
- Retail Stores
- Online Platforms

### Regions Covered:

#### North America

United States

Canada

Mexico

#### Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

#### Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

#### South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

§ Saudi Arabia

§ United Arab Emirates

§ Qatar

§ Israel

§ Rest of Middle East

Africa

§ South Africa

§ Egypt

§ Morocco

§ Rest of Africa

**What our report offers:**

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

### **Free Customization Offerings:**

All the customers of this report will be entitled to receive one of the following free customization options:

#### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

#### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

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15.10 Nissan Chemical Corporation

15.11 PI Industries Limited

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